

11 Recommendations to Advance the Food Hub Sector:

A white paper



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Executive Summary

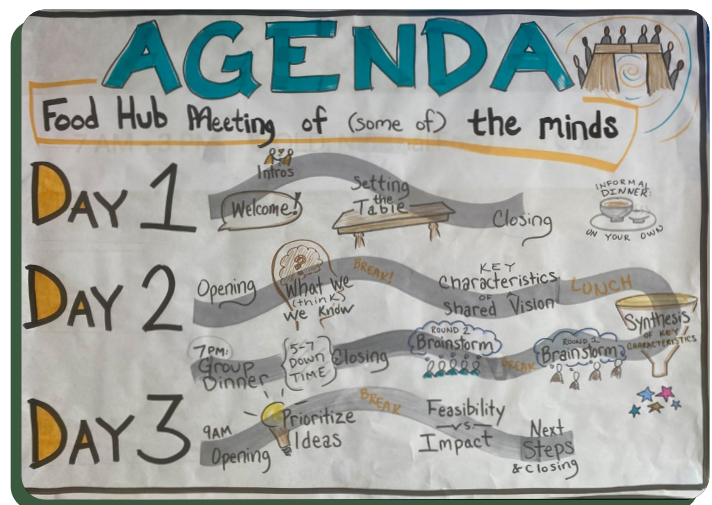
In early May 2025, a small group of food hub experts gathered to discuss core challenges, opportunities, and shared needs, highlighting systems-level themes and actionable next steps to advance food hub sector development for the long term. While the gathering had been planned to take a long-range, strategic approach, the 14 national leaders gathered amid extreme economic and social uncertainty as federal funding cancellations created stress for hubs and their stakeholders alike. Nevertheless, rich dialogues supported by skilled facilitation and graphic recording generated a set of guiding characteristics for the future, and key recommendations to advance the food hub sector.

The group also explored the tension between scaling food hubs and upholding equity for producers and people facing food insecurity as a stated value of the sector, and reflected on how the food hub sector can honor racial equity in particular.

While our discussion was designed to focus on long-term, big picture strategic thinking, we also acknowledged the precarious situation food hubs are currently facing due to the cancellation of federal programs and market instability, and the need for urgent action. As a result, the group further prioritized the need to immediately create an initial rapid-response capital pool for food hubs, which can be further evolved into a longer-term pool for strategic food hub development.

By order of impact, the priority recommendations this group identified included:

1. Creating Capital Pools to support Food Hubs
2. Exchanging Case Studies, Sharing Knowledge and Legitimizing Diverse Hub Models
3. Creating a National Food Hub Association or Organization
4. Aligning Hub & Food Service Ordering Strategies
5. Elevating Leadership from Marginalized Communities and Resourcing Locally-Led Solutions
6. Advancing Policy Mechanisms to Build a Fairer Marketplace
7. Supporting Food Hub Networks
8. Creating a Marketing Campaign for Public Visibility & Reclaiming Narratives
9. Exposing Institutional Kickbacks and their Harm
10. Sharing Food Hub Services and Systems
11. Exploring Novel Partnerships & Models



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State of Urgency

As the Food Hub sector has grown and developed over the past 20 years, food hubs have increasingly been recognized as a crucial piece of middle-of-the-value chain infrastructure and foundational to strong, local and regional food systems. By streamlining local food aggregation and distribution, food hubs enable many different market channels to access local food, building robust markets for local farmers as a result and catalyzing local food systems to scale.

Food Hubs also often play a behind-the-scenes role in connecting grocery stores, restaurants, institutions, schools, and community members to local food. Their resilience and nimbleness has positioned them to serve their communities in times of need. Hubs mounted herculean pivots during the pandemic, sourcing local food to backfill broken links in the industrial supply chain. They played key facilitation roles to make the federal Local Food Purchase Assistance Program (LFPA) and Local Food for Schools (LFS) successful, supporting food access organizations and schools to buy local foods. Food hubs stepped up to meet the moment, planning, budgeting, and investing based on increased market demand from federal programs authorized through 2027 - and so too did the farmers, fishers, and food producers who supply them.

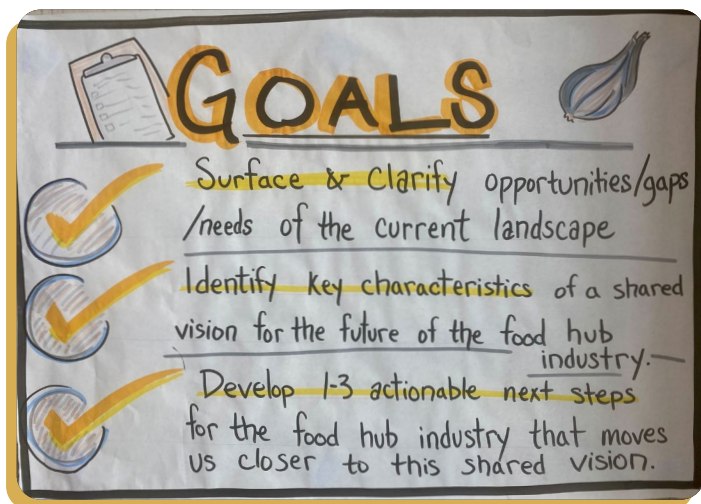
However, in the weeks and months before this gathering, food hubs across the US saw billions of dollars of sales opportunities through LFPA and LFS programs disappear as the administration cancelled those programs and withdrew allotted funding. Federal disinvestment from these and other programs have put food hubs and the stakeholders they serve in extremely precarious financial positions. Hubs budgeted based on those opportunities, and they invested appropriately

in growth- building infrastructure and hiring staff- to serve them. Now, with a dramatic decrease in expected sales revenue to service those investments, many hubs are at high risk for insolvency.

One central theme was abundantly clear throughout our conversation: the times we're in require immediate action, and food hubs are in urgent need for major financial support. Losing otherwise robust and potentially viable food hubs across the United States, will dismantle critical assets of regional food systems nationwide and spell disaster for the broader local food movement. Such broad damage to these pivotal aggregating businesses would erase many of the gains our sector has made, causing financial upheaval for small and mid-sized farm and food businesses, severing relationships between food producers and customers, decimating local food infrastructure, and setting local and regional food systems development back 10 years or more.



Clockwise from top: Elliott Smith, H Nieto-Friga, Haile Johnston, Alena Paisano, Sarah Larson, Angel Mendez, Roland McReynolds, and Lucy Flores



Graphic recording by Kristen Eggen Visuals

Consequently, food hubs are in dire need of partners and funders who will bridge them through these extreme circumstances and share the risk they incur to re-regionalize food economies across the US. The participants discussed how philanthropy has a unique and time-sensitive role to play in supporting existing hubs through this time with operating funds and even loan payback to retain the momentum they've established. The philanthropic community can also meet this challenge by encouraging forward-thinking colleagues to align around the priorities identified below which will ensure food hubs can be viable for years to come.

It is clear that significant investment in food hubs is needed **now**. As hosts of the event, we encourage Builders Vision who supported this convening (and its communities of fellow funders) investing in food systems, justice, agriculture, economic equity, and health equity to not only consider funding the long-term priority recommendations outlined in this document, but also to take immediate action for the urgent needs identified.

We recommend creating an initial rapid-response, practitioner-led capital pool to strategically address urgent food hub needs resulting from LFPA and LFS cancellation, which could easily be further developed into a longer-term pool for strategic food hub development as outlined in the recommendations that follow.

To guide development of this pool, we recommend funding compensation for practitioner leadership to form a steering committee, which could include Meeting of (some of) the Minds participants and/or additional key stakeholders, with backbone interim coordination to support the committee's work. This group could also provide guidance and early coordination to incubate next steps on the other, longer-term recommendations recommended here, including creating opportunities to engage additional food hub leaders in shaping next steps, refining priorities, and defining regionally-specific needs.



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Background

In Winter 2025, Kitchen Sync Strategies (KSS) began discussions with Builders Vision and Walton Family Foundation about patterns we were seeing among food hub clients across our four institutional sales regions, and the need we identified to unearth widespread challenges and trends and build collective strategies. Both funders wanted to better understand the challenges food hubs face to inform their own philanthropy.

From these conversations, KSS proposed convening an initial, intimate summit of diverse food hub leaders with deep in-the-field experience. Our goal was to convene food hub experts to discuss core challenges, opportunities, and shared needs, highlighting systems-level themes and actionable next steps to advance sector development for the long term. We aimed for a small group of participants who were geographically and racially diverse, represented different philosophical approaches to food hub development, and reflected the breadth of national food hub industry experience. KSS connected with 14 national leaders, inviting them to "galvanize a discussion about what comes next for the food hub sector." This was an opportunity to assemble a focus group and learn from this particular group of stakeholders, including a range of key perspectives in the food hub sector. While this approach provided the valuable insights detailed in this report, we also acknowledge its limitations. It was not inclusive of all stakeholders in the food hub sector writ large, nor does it represent the diverse opinions of the entire sector.

With funders supporting honoraria, facilitators, and travel costs, KSS prepared an invitee list based on our existing networks, trusted partner advice, and our own understanding of each invitee's food hub experience. We started planning in the late 2024, when public programs were providing historic investment in local food system development, but our convening occurred in early May of 2025, after unexpected cancellations of programs had created extreme economic uncertainty for hubs and their stakeholders, creating a heightened sense of urgency and importance for this conversation. Less than 45 days after our gathering, the Regional Food Business Centers, a key program for investing in middle-of-the-value chain businesses, were also terminated.



Pictured from left: Alena Paisano, Kate Fitzgerald, Tom McDougall, Teresa Wiemerslage

Methods

Prior to our in-person gathering, facilitator Lucy Flores of Studio Magic Hour initiated one-on-one calls with each participant to understand their perspectives and identify themes and 'opportunity areas' to explore in our idea generation and design conversations. After group workshoping on our first day together, the anchor question guiding the agenda for the summit became: "What are the next steps for the food hub industry?" During the gathering Lucy led discussion, while Kristin Eggen of Kristin Eggen Visuals provided graphic recording.

Lucy guided the group through discussing the values, principles, and characteristics intrinsic to their vision for the future of food hubs, using themes and insights identified from interviews as a launchpad for groundtruthing and collective sensemaking. Then, in small groups, participants chose multiple themes or 'opportunity areas' to explore, brainstorming ideas to advance food

hubs and food systems within those areas. Finally, the small groups voted on their ideas, choosing those that would most move the needle towards the key characteristics of our vision for the food system, and those that most energized each participant. Groups then prioritized their top 5-6 ideas, and shared them out with the large group, where their feasibility and impact were rated on a matrix in collective discussion. Ideas generated in an individual brainstorming activity were also pulled into the conversation. The highest-priority ideas and the discussions around them became our key recommendations. After the gathering, all ideas brainstormed in these sessions were coded by themes and analyzed, and notes from our large group discussion were organized to add context and additional description to this report. Participants provided feedback and guidance on this document, both via written feedback and in two follow-up discussions.

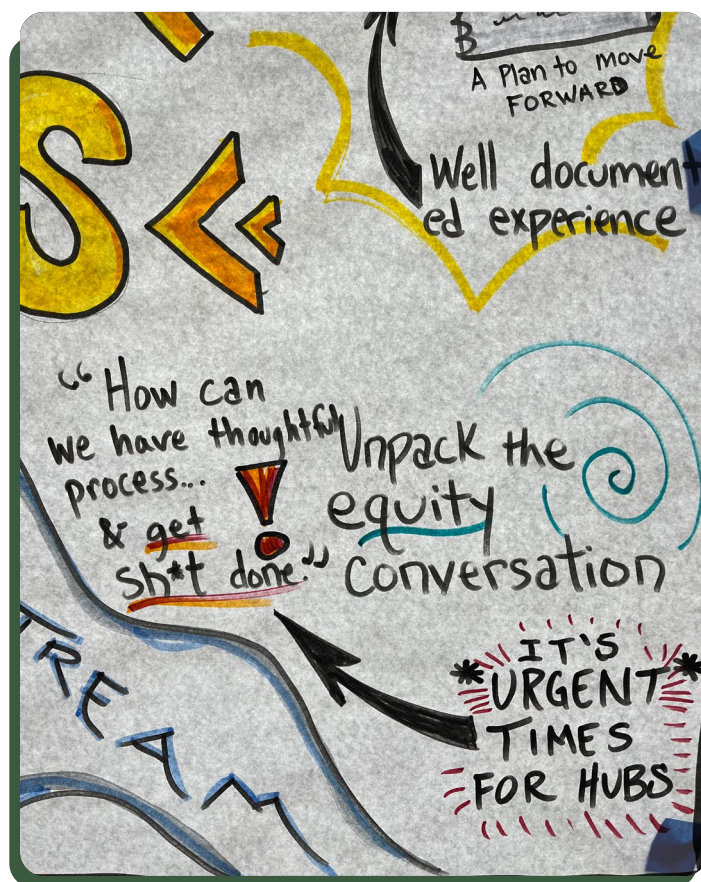


Standing, left to right: Roland McReynolds, Teresa Wiemerslage, Susan Lightfoot Schempf, Kayla Koether, Alena Paisano
Seated, left to right: Amber Bell, Angel Mendez, Sarah Larson, Tom McDougall, Kate Fitzgerald, Heather "H" Nieto-Friga, Elliott Smith, Lucy Flores, Haile Johnston, Dave Prather, Kristin Eggen, Saleh Azizi, Haven Leeming, Emily English

Our Vision for the Future of the Food Hub Sector: Key Characteristics

As this group considered the future of the food system and the Food Hub sector, we synthesized shared principles and characteristics we see as integral components of that future¹. We foresee a future for food hubs in which.

- Farms, ranches, and fishers are thriving and prosperous; *all* producers have market opportunities and access to fair and transparent markets, with focused attention ensuring that producers who have been historically marginalized and those who traditional buyers have overlooked have equitable market access.
- Both the current and the next generation of farmers, producers, fishers and workers across the value chain are supported, and generational transitions of farms and food businesses are viable
- Values-based relationships are prioritized and centered in transactions, which are non-extractive
- Buyers and policymakers alike recognize that regional food systems are optimized food systems and prioritize regional procurement.
- Food Hubs are economically viable, support a thriving workforce, and are workplaces of care, dignity, meaningful relationships, and joy.



Graphic recording by Kristen Eggen Visuals

¹Note- the principles and characteristics are not presented in any particular order.

- Food Hubs form strong collaborative, cooperative, representational networks that share power, risk, and resources. These networks operate transparently, achieve collective impact, and leverage their resources to move towards greater equity.
- The work of Food Hubs is community driven, responsive to community needs and current realities, and focused on providing benefits to communities they serve.
- Food Hub sourcing, and the food production systems hubs incentivize and influence, continually progress towards the most regenerative agricultural practices.
- Food Hubs are valued as both soft and hard infrastructure that serves the public good, and the ecosystem surrounding them is well-resourced and capitalized, with talent, tools, public resources, and the additional support services their farmers need.
- The Food Hub sector has visibility & influence. The role and work of food hubs are well understood by food system stakeholders, policy makers, and the public. Food Hubs successfully conduct policy advocacy on behalf of the food system.
- All people have equitable access to local food, and communities are served by their food systems, which are designed around their needs, reflect the ways in which they access food, and are accountable to producers and consumers.*

* While this group aligned on a vision for equitable food access, there was less consensus on whether serving food access markets should be equally core to the mission of all hubs, and to the hub sector, as creating fair markets for farmers. Some participants voiced that providing access should be equally core to the mission and our conceptualization of food hubs. Others expressed that hubs' defining characteristic is their transparent and fair sourcing from farmers, which differentiates hubs from food access organizations and distributors; thus serving farmers is their primary mission, with food access secondary.

There is a fundamental underlying tension at play in food access markets; food hubs work to increase farmers' earnings by offering fairer prices, but food access markets often demand lower prices than other channels. Thus, serving food access markets can pose an even greater financial challenge to food hubs. Ultimately, many food hubs struggle with this dynamic, but individual food hubs have different driving missions, and prioritize farmer viability and equitable food access differently. Some existing hub business models do not serve food access markets at all. In this conversation, we did not attempt to resolve whether serving food access markets should be considered a defining role of all food hubs.

Food Hubs and Racial Equity

Is racial equity a core value of the food hub sector? The value of creating a food system that is *both* racially and economically just was expressed through the key characteristics in our future vision. This included a vision where hub networks move towards greater equity, hubs are driven by and representative of their communities, disadvantaged farmers have access to markets, and the ways in which food is provided reflects the diverse ways communities and cultures share and access food. However, while the group referred to the value of racial equity in our large group conversations, when given the opportunity to brainstorm concrete solutions along select themes for discussion in small groups, none of the groups chose the themes more explicitly focused on racial equity: supporting Indigenous food hub models, or investing in hubs that support our most marginalized communities. (Though participants did opt to engage in these themes in an individual, written brainstorming activity).

Together, the group explored the possible reasons for that and reflected on its implications. Maybe these small groups were not representative enough of impacted groups to engage deeply in those conversations, and participants were aware of their limitations. Or, perhaps we were making assumptions that this value was built into the solutions we were creating in themes less explicitly tied to racial equity. Or, maybe we had discussed the value but then failed to design around it, meaning that our strategies, tactics, and actions would fail to advance it. The group observed that there is a danger of stating a value, but not acting on it.

Some participants voiced that food systems actors and individual food hubs often claim equity as a value, but act on that value only when financial incentives and grants provide an *opportunity* to be equitable. True equity work, one participant voiced, is not opportunistic in this way. Hubs or food system actors who claim this as a value, but do the work based on funding opportunities can divert much-needed investment from those hubs and groups who are meaningfully embedded in and committed to serving marginalized communities.

And yet, participants acknowledged that hubs attempting to scale have challenges to break-even financially while providing fair markets for small and mid-sized farmers, and therefore may not be able to focus on working with the most marginalized farmers, who, due to systemic lack of access to land, capital, and investment, need more support to be prepared for wholesale markets. As one of the group said, "It's ok if you're not able to do that [equity work], because you're scaling, but then SAY it." Perhaps instead of claiming racial equity work, it's more honest, just, and fair to be clear about those limitations; doing so provides opportunities to pass resources and funding opportunities on to other partners better positioned to take action on racial equity.

Still, many participants voiced that racial equity needs to be in the DNA of the work the food hub sector is advancing, and named as such. Multiple people shared they wouldn't want to be part of work related to food hubs if racial equity wasn't a stated value. Some past food systems and food-hub related

efforts were dismantled because they lacked this crucial foundation, and as a result created spaces that were non-inclusive to communities of color and Indigenous communities and failed to adequately support the advancement of more equitable food systems. Participants did not want to recreate this failure.

The group seemed to reach a consensus that this value should be in our DNA as a food hub sector. But perhaps, one participant voiced, instead of expecting all the racial equity work necessary to advance farmers of color to be accomplished by and embedded in every food hub's operations, we

need to create other investments in marginalized communities. Those investments can provide the infrastructure and technical assistance needed to advance marginalized farmers and help them participate in the markets hubs are creating.

Some food hubs are positioned to embed racial equity in their operations. Others who are less positioned to do so can honor equity as a value by partnering with and directing resources to other hubs and groups that are operationalizing racial equity in their work, and by advocating with marginalized communities for the investments that will advance their food systems.



Graphic recording by Kristen Eggen Visuals

Priority Recommendations



Creating Capital Pools for Food Hubs

Developing capital access for food hubs has the highest impact potential of any intervention the group discussed. Specifically, the group suggested philanthropic funds be pooled to support food hubs, with practitioners- hub operators and hub industry leaders- engaged in managing and awarding funding to individual hubs, utilizing participatory grant-making or investing structures.

Hubs need flexible capital to fund both infrastructure and operations. While grants specifically often center on hard infrastructure investments like warehouses and trucks, hubs also need grants for soft infrastructure, such as adding staff roles that will facilitate hub growth and eventually pay for themselves. Wholesale hubs also need working capital to manage the slow cash cycles that result from paying farmers more quickly than they are paid by wholesale accounts. Grant funding can be even more critical for hubs in marginalized communities, including rural areas, where greater distance increases route costs, lack of existing infrastructure to rent can necessitate upfront investments in trucks, coolers, and warehouses, and fewer funders exist to offer grants and support. Any pooled fund should support both infrastructure and operations, and should be deployed through multiple forms, including but not limited to:

- Grants
- Novel financial instruments
- Endowments (or other long-term operating capital) for individual hubs
- Low or no interest loans

The group considered this extremely high-impact activity as low feasibility, because they have not seen private funders step into this space heavily or broadly. Furthermore, broader recent federal grant programs that food hubs are eligible for (but include much broader grantees)- are either limited-time programs (such as RFSI) or were limited-time and are now cancelled (Regional Food Business Centers). Neither is a hub-specific, long-term solution for funding.

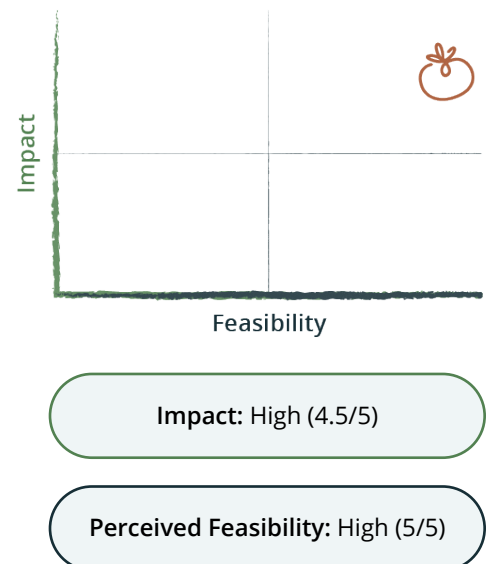


Exchanging Case Studies, Sharing Knowledge and Legitimizing Diverse Hub Models

The food hub community will accelerate learning- and therefore evolve and flourish more rapidly- if experiences, approaches, and lessons learned by individual hubs can be widely disseminated to their peers. This group viewed sharing case studies, successful models that work in particular contexts, impact metrics, and outcomes as highly impactful and key to amplifying the impact of food hubs nationwide.

When hubs exchange experiences, models, and experiments with their peers, they can accelerate innovation within a network and a community of practice. Sharing these stories can help hub leaders see what's feasible and understand how their individual experiences, data, and metrics benchmark to other hubs, adding to the body of knowledge advancing local food aggregation. Capturing efforts and recording them also enables the food hub sector to pass institutional knowledge on to new leaders and hub operators, and ensure past lessons guide current development.

Furthermore, the group viewed diverse food hub models designed to work in specific contexts as crucially important, and considered knowledge sharing as central to legitimizing and advancing those models. Hubs operating in rural areas, those operating in and serving communities of color, and those serving resource-limited farmer communities face added complexities. Hubs working in similar contexts can learn from each other, even if those hubs are geographically dispersed. Building a community of practice for such diverse hubs to create innovative solutions together, co-evolve models, and develop impact metrics suited to their contexts will strengthen the field of food hub development. It will also help the broader hub community understand the complexity inherent in working in diverse contexts and value the sophisticated solutions hubs design in response to that complexity.

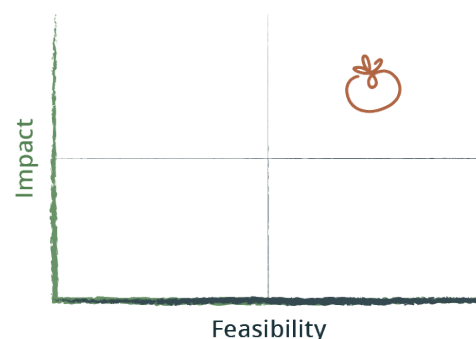


Creating a National Food Hub Association or Organization

A food hub industry association or national membership organization was a continued theme throughout the gathering, and one of the key recommendations participants ranked as high impact and high feasibility. Participants underscored the power of networking for systems change. The group discussed the many nested activities and services an organization could provide to the hub sector, many of which were considered strong recommendations in their own right that would be best conducted under a national umbrella. High priority activities that the group discussed as related to a national entity included:

- Hosting National Food Hub Conferences, and creating more opportunities to get food hubs in shared space, building communities of practice, and providing opportunities for them to exchange knowledge, explore new ideas, and collaborate.
- Measuring & showcasing food hub impact by developing and collecting uniform metrics, as well as creating metrics for diverse hubs to lift up non-uniform impact. (The group felt a backbone organization would be required to facilitate crafting and collecting this data)
- Developing a food hub directory

Furthermore, the group stressed how many of the other recommendations laid out here would require some type of coordinating entity to implement them. In this regard, an association could perform or shepherd all the priority recommendations we identified and strengthen their impact.

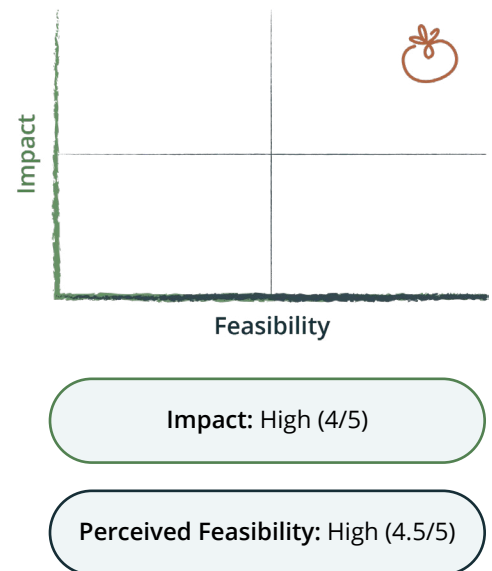


Impact: High (4/5)

Perceived Feasibility: High (4/5)

Aligning Hub & Food Service Ordering Strategies

Food service represents a huge potential market for local food and food hubs, with the capability to purchase high volumes. However, it is challenging for hubs to serve the scale of these high-volume customers within their existing ordering systems and procurement norms. This key recommendation is intended to help the food service industry and food hubs work seamlessly together by creating complementary, shared 'playbooks' that align institutional food service purchasing and food hub sales to unlock this market. This effort would largely focus on setting up operational procedures and agreements, including developing processes around menu planning, crafting and responding to bids, demand forecasting, ordering systems, and even payment terms. Aligned volume purchasers could further support hub development through innovative arrangements like pre-paying or forward contracting, which bolster hub and farmer cash-flow and de-risk the process of scaling production.

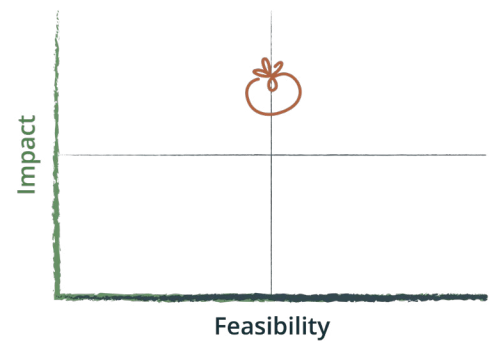


Importantly, these playbooks would leverage on-the-ground experience aligning hub and buyer strategies, and apply it broadly in support of hubs and food service operations in many geographies. While this recommendation focused on procedures and agreements, the group also discussed that the development of additional tools could further align hub-to-institution sales; one example included advancements to food hub ordering software, allowing buyers to accurately forecast demand and order products far in advance.

This recommendation is a high priority because growing wholesale hubs are seeking large-volume sales but often lack the planning and coordination tools needed to secure them. Part of the challenge is that Food Service menus often are often written around the products offered by the account's prime distributor, (whose product availability and pricing are fixed far in advance) whereas hubs are often working in systems that emphasize dynamic, current availability. When hubs can share their product availability further in advance, they are more successful in getting their items menued at food service accounts, unlocking these higher volume and more frequent sales. Furthermore, the industrial food system has oversupply and can absorb high volume sales in realtime, enabling customers to place large orders for fairly short-term delivery. In contrast, hubs often need to plan far ahead in order to coordinate sourcing for high volume sales and can't tolerate high shrinkage or loss. Being able to pre-plan with their farmers for increased demand is critical to their ability to meet it, and this is at odds with many of standard practices within food service.

Elevating Leadership from Marginalized Communities and Resourcing Locally-Led Solutions

One of the food hub sector's strengths is that it fundamentally seeks to address the marginalization of small and mid-sized farmers and build opportunities for them. While small and mid-sized farmers by definition experience economic marginalization, the degree of systemic marginalization in the food system, like all parts of public life, is greater for those in rural communities, and greater still for people of color and Indigenous peoples. There are strong food systems and food hub leaders in those *most* marginalized communities who are advancing solutions using leadership styles and strategies grounded in their culture and context. However, the broader food hub sector historically and currently tends to overlook them and discount their approaches to leadership. Consequently their voices, experiences, and leadership styles are not recognized and valued. This recommendation is to instead value leadership approaches grounded in culture and context, to elevate those leaders at the forefront of this work in marginalized communities, and to ensure that their locally-led solutions are resourced. This approach stands in contrast to tokenizing individuals or simply sharing the stories of people working in marginalized communities without shifting the underlying power structure.



Impact: High (4/5)

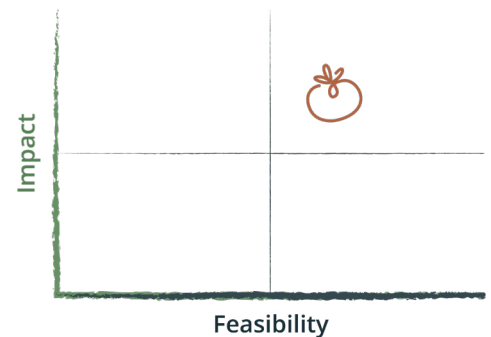
Perceived Feasibility: Mid (2.5/5)

In many ways, by creating opportunities for food hubs and their support ecosystem to come together, name shared needs, and create shared platforms, this group is suggesting that food hubs consolidate their collective power to advance the entire sector. Consolidating our collective power *can* increase it, but it's important that we redistribute and share the power by elevating the *most* marginalized communities who have been isolated from it.

The group considered this recommendation to be high impact, but mid-feasibility; the wider food hub sector will have to build trust and social capital with people who have seen their narratives and innovations overlooked or misappropriated in the past, and may not want to build or share their social capital with a broader food hub sector.

Advancing Policy Mechanisms to Build a Fairer Marketplace

The group acknowledged that we are working in a time when federal government support for food systems development and local purchasing was being curtailed in many program areas, making public policy solutions feel less feasible. However, the group also acknowledged that policy can and should play an important role in correcting market failures, supporting price corrections, and addressing food system problems. The group discussed how the dominant food and agricultural system is highly subsidized, enabling large-scale competitors to source artificially cheap food. In the absence of policy interventions and incentives to support local food, hubs are operating on a dramatically uneven playing field- competing for market share against highly subsidized (and highly consolidated) food businesses. Without policy intervention, hubs are being asked to internalize the economic gap between those dominant, subsidized systems and their unsubsidized models, and to do so while improving economic opportunities for marginalized farmers and communities.



Impact: Mid-High (3/5)

Perceived Feasibility: Mid-High(3/5)

The group brainstormed many policy mechanisms that could support price corrections via buyer (demand) mechanisms, direct support for hub aggregators, or supports for the wider food system. These mechanisms could be enacted at both the state and federal level. Some examples:

Buyer support:

- Subsidized purchasing and other purchase incentives, as in recent federal programs like the Local Food Purchase Assistance Program and Local Food For Schools which had high impacts on local farmers and food hubs (particularly in states that implemented this program to prioritize local foods and small and medium farms). That said, the group noted that when buyers receive incentives, they often also need technical assistance to connect to local value chains and implement purchases.
- Supporting and upskilling public purchasers to prioritize using existing geographic preference statute language to advance local food in sourcing and bids, and increasing micro-purchase thresholds for public institutions.
- Tax credits or other economic development strategies that incentivize private markets to prioritize local purchasing.

Hub support:

- Publicly subsidizing hub activities. This could include:
 - Covering costs for aggregation and distribution on expanded routes that provide a community service (even if they're not profitable), such as providing market access to farmers- especially in rural contexts, or distributing in areas that otherwise lack food access.
 - Supporting hubs in exploring non-traditional and innovative ways of doing business
- Treating food hubs like public utilities (and providing food as a public good) came up in discussions of rural hub development.

System supports:

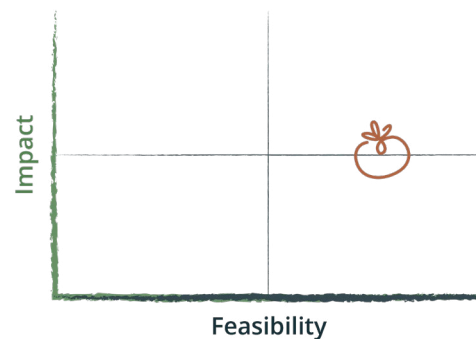
- Public investments or tax incentives for building food systems infrastructure
- Public investments to advance Tribal food sovereignty

Supporting Food Hub Networks

Food Hub Networks in this context, refers to groups of food hubs that collaborate, develop peer support, and form business partnerships. These networks, often regional in nature, are distinct from casual social networking or learning opportunities; rather they are more deeply embedded, operationalizing collaborations that advance each others' business development and their collective opportunities while enhancing market access for their farmers and scaling regional food systems. Multiple examples of regional networks exist across the United States, with member hubs engaged in different types of formal or semi-formal partnership (i.e. NW Food Hub Network, Eastern Food Hub Collaborative, NC Food Hub Collaborative, Iowa Food Hub Managers Working Group, etc.).

At lower levels of commitment, hubs share camaraderie, trust, and community, and share key assets- like operational procedures or food safety plans. At higher commitment levels, hubs engage in sophisticated trade and shared transactions- supplying each other with products or services. Some hub networks have also developed strategies to unlock new markets and service high-volume accounts by marketing their combined product list and selling their products together in networked sales. The group discussed myriad ways in which hub networks can collaborate to develop the food system and improve viability- both for individual hubs and the farmers they serve:

- Aggregating volume to unlock sales to large accounts (networked sales), including working collaboratively to respond to buyer bids
- Sharing services between hubs e.g. share contractors or staff such as fractional CFOs, sales roles, marketing, administration, etc.)
- Creating and sharing standardized processes like SOPs, quality assurance, or farmer onboarding
- Shared routing & logistics coordination, including:
 - Combined or coordinated freight
 - Creating SOPs & agreements for last mile delivery
 - Cross-docking
- Buying and selling products from each other
- Helping farmers access right sized markets and other channels
- Regional trading to access products from different climate zones
- Specializing & focusing on strengths- for example rural hubs with more supply can connect with urban partners with more markets for sales (such as Farm to School, food boxes, or aggregated CSA shares)
- Building connections to regional distributors



Impact: Mid-High (2.5/5)

Perceived Feasibility: High (4.5/5)

Supporting Food Hub Networks (Continued)

Developing Network Nodes: Some hub networks are experimenting with nodes- sites that are not full-fledged hubs, but that provide key infrastructure to support network and market development. Nodes can be especially important in rural communities. Nodes are often cross-docking facilities where multiple farmers can drop products so the food hub can consolidate pick-up, and/or where last mile delivery for sales can be coordinated by local partners. This allows farmers near the node to sell into one or more existing hubs, and can facilitate hubs supplying markets in the node's region as well. Hubs are also able to use nodes to cross-dock with each other and facilitate hub-to-hub sales. Where it makes sense, rather than proliferating more food hubs, local groups can link into existing hub networks to achieve community goals by creating a node. This can create better market access to both farmers and consumers, and reduce costly attempts to establish nonviable, full-fledged food hubs.

While operational food hub networks can take many shapes, and partner on many different activities, their collaboration is key to ensuring hub viability and scaling the food system. This recommendation emphasizes the seminal importance of nurturing these networks- by supporting network infrastructure development, funding networks, and funding the crucial network facilitation- often led by external regional partners- that deepens their development and sophistication.

Creating a Marketing Campaign for Public Visibility & Reclaiming Narratives

The general public has very little awareness of what food hubs do and how they address crucial challenges in the food system. Our recommendation is that food hubs create a marketing campaign to portray our work as serious and professional, and draw public awareness to their role in the food system. This would manifest itself across multiple fronts- a National Food Hub Marketing campaign, with an advertising agency that can develop taglines and social media posts, engaging eaters to spread the word on social media and highlighting food hub employees on social media as well. At the national level, this could also include Netflix-worthy storytelling, such as “This American Food Hub,” a Chef’s Table style documentary.

At the individual hub level, this recommendation and activity would support high-quality, professional marketing for individual food hubs, supporting consulting, media, and comms support to develop their brands and strengthen their stories.

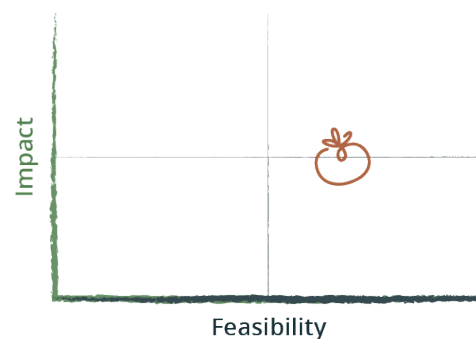
Related to this marketing campaign is the need to reclaim the narratives for the work of food hubs. In the vacuum of food hubs and food systems leaders’ public visibility, narratives around healthy food have been dominated by others with less on-the-ground, fact-based, solutions-oriented perspectives. Through public messaging, hubs can reclaim some of the narrative around important and misunderstood parts of their businesses like ‘regenerative’ products and can lift up social impact metrics. This would also counter some of the oversimplifications and misinterpretations in the “Make America Healthy Again” infosphere by helping the public understand that these ideas are not new, and people have been working on developing ‘healthy’ food systems for decades.



Exposing Institutional Kickbacks and their Harm

Few casual consumers or even food system enthusiasts are aware of the kickbacks, financial incentives, agreements and arrangements that have calcified in the foodservice industry between food service management companies (FSMCs), their distributors, and corporate agribusinesses. These kickbacks or rebates dramatically change incentives for procuring food, generating a significant *income* stream for FSMCs in which distributors pay them for buying large volumes of their product. These arrangements go well beyond normal volume-discounts in their scope and impact. As a result of these incentives, buyers are not deriving their revenue from their institutional customers and consumers they serve, but instead they depend financially on their distributors for their budgets (and make procurement decisions accordingly).

This dynamic plays a huge role in locking other, smaller suppliers out of institutional markets and preventing local wholesale food hubs and their farmers from accessing large volume institutional sales. This group recommended that this dynamic be broadly exposed through reports and media in order to work towards abolishing kickbacks and other dubious arrangements that concentrate power with consolidated food companies and prevent institutions from supporting local farms with their purchasing power. Exposing the harm to consumers and farmers is important to create reform in the system. One participant noted that some existing organizations are working on this as part of anti-monopoly and anti-concentration efforts. This work can benefit the food hub sector, and food hubs can support and collaborate with existing efforts.



Impact: Medium (2.25/5)

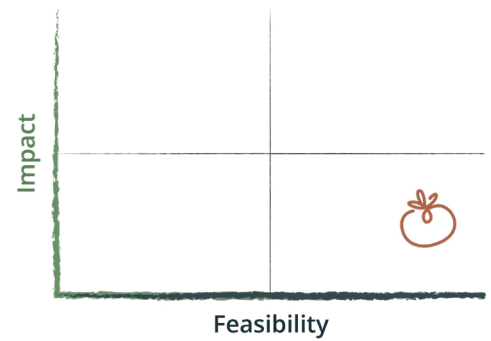
Perceived Feasibility: Med-High (3/5)

Sharing Food Hub Services & Systems

This recommendation optimizes food hub efficiency and purchasing power through shared services and systems. It's distinct from the recommendation on supporting regional operational food hub networks (which might also share some services to defray costs), in that these shared systems could be at an elevated scale, or even a national scale, to achieve collective buying power. Depending on the type of service, number of food hubs engaging in it, and their collective purchasing power, some shared services would be more achievable than others. Examples could include:

- Group insurances like product liability, commercial general liability, and auto insurance,
- Group purchasing of boxes and packing material, or equipment
- Shared software and technology, including for sales and inventory management
- Employee healthcare

A food hub association would be well-positioned to facilitate these types of shared services.



Impact: Medium-Low (2/5)

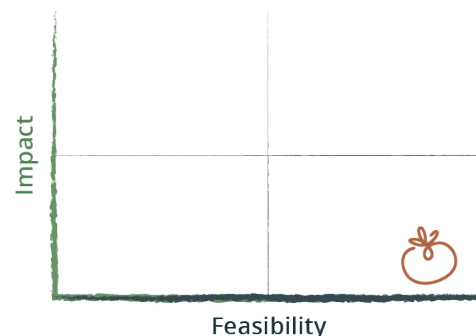
Perceived Feasibility: Med-High (4/5)

Exploring Novel Partnerships & Models

This recommendation was to look outside existing U.S.-based food hub and food system knowledge to seek out new approaches to networks, partnerships, and food systems development. Resources and references 'outside' the common body of knowledge could include:

- Exploring novel partnerships with industries adjacent to our work that we have not yet deeply engaged.
- Researching how networks and associations in other industries or sectors develop and function, including considering what types of infrastructure or costs they share, their inter-party MOUs or agreements, and how they coordinate. Some examples included libraries which share catalogs and facilitate interlibrary loans, or professional associations for healthcare professionals.
- Exploring aggregation and distribution models in other countries to see what lessons could apply to food hubs in the U.S.

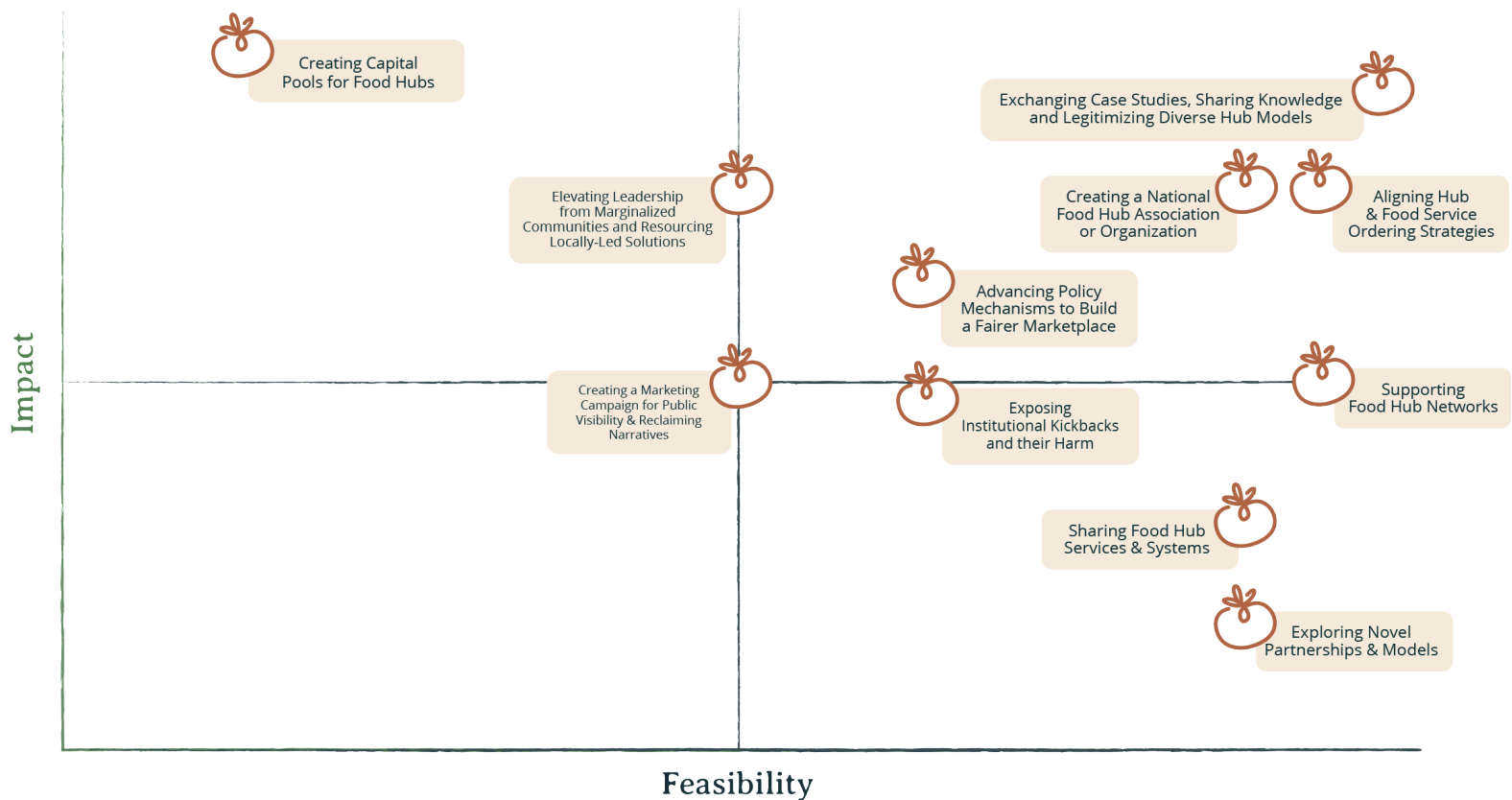
Knowledge gleaned from these cross-industry and international comparisons could be shared in communities of practice and through case-studies and other forms of knowledge dissemination.



Impact: Med-Low (1.5/5)

Perceived Feasibility: High (4/5)

Priority Recommendations



Other Important Themes

Food Hub Metrics

Creating and collecting shared metrics for the food hub industry was strongly recommended as a priority in its own right, though the group felt the ability to enact this priority was dependent on a backbone organization. Defining quantitative and qualitative metrics for success would be a powerful tool for hubs and the wider sector, allowing hubs to set goals, communicate impact and gauge progress at individual and collective scales. Creating metrics would also empower hubs to reframe the value they create beyond pure profit and loss from sales and encompass wider impact for farmers and consumers. In the process, hubs could develop ways to assess their soft (social, cultural, and knowledge-based) assets. Many groups discussed the need for shared metrics as a necessary tool to support multiple priority recommendations, and to communicate across audiences, including raising awareness with the public and with policy makers, sharing knowledge within the hub sector, and allowing hubs to benchmark themselves. Metrics could help the sector improve and demonstrate impact over time; one participant even considered using the metrics to tie incentives to measurable targets.

Food Hub Gatherings and Communities of Practice

The need for a national food hub gathering, and other variations of in-person gatherings, was a repeated theme from many brainstorming conversations. Participants expressed the need for hubs to build relationships, share knowledge, and create opportunities for collaboration and collective action in person, and online- in virtual gatherings and listservs.



Left to right: Laura Edwards-Orr, Dave Prather, Kayla Koether

Education & Technical Assistance

Providing training and technical support for food hub staff emerged repeatedly in brainstorming activities as key support needed for the hub sector. Ideas ranged from professional training programs and continuing education courses to apprenticeships and mentorships, a peer business group, or even a standardized onboarding course for food hub employees. In-person gatherings would support learning opportunities. Participants specifically articulated the need to support knowledge transfer to the next generation of food hub leadership as experienced food hub leaders retire or exit the sector.

Knowledge of financial management especially emerged as an important topic for education, and it was also an area where participants identified the need for one-on-one technical assistance. Individualized coaching can help hub operators plan their business model, set goals, interpret financial metrics, determine viability (especially important when starting a new hub), and plan succession and transition. The need for hubs to have funded, intensive, 1:1 support from specialists with many different areas of expertise was acknowledged as critical to grow complex food hub businesses.

Participants also discussed the need for strong technical assistance for the farmers and buyers hubs work with. They noted that other organizations could support value chain coordination and training with those stakeholders, and the importance of building relationships with other organizations who can fill those roles.

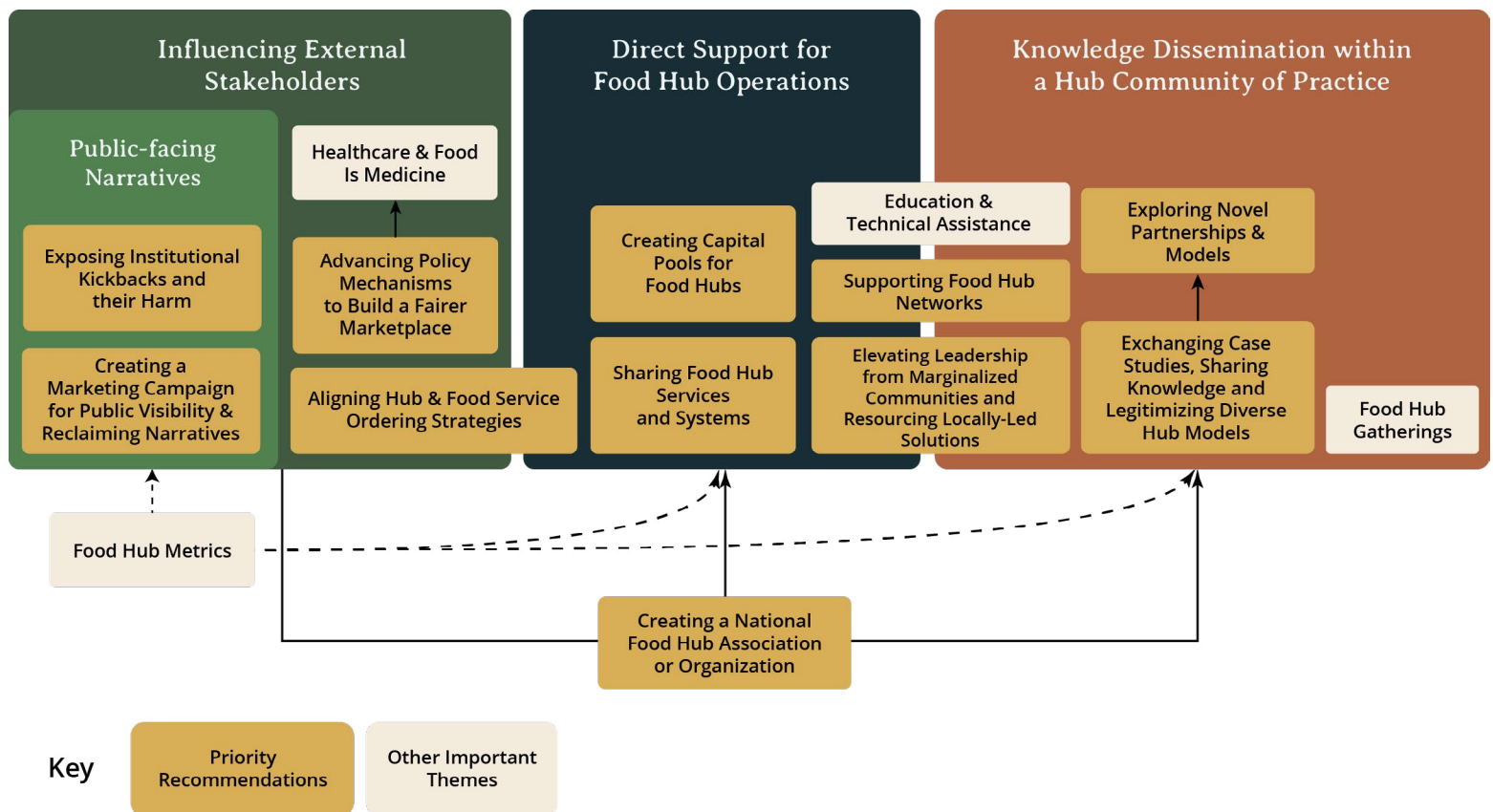
Healthcare & Food As Medicine

Small groups surfaced the need to create strategies to ensure local food is embedded in food as medicine efforts and prioritized by the healthcare field. Participants discussed the need to engage with health agencies and public health funders, and to work with healthcare organizations as a buyer for local food. One participant invoked a vision of Food As Medicine becoming a substantial anchor market for food hubs.



Graphic recording by Kristen Eggen Visuals

Interconnectedness of These Recommendations



The priority recommendations and the other important themes we discussed in this conversation are linked to each other and mutually reinforcing in myriad ways. Crucially, participants repeatedly identified that the establishment of a national food hub association or organization could create the representative framework and the infrastructure to advance other recommendations, and the food hub sector, at the national level. The group identified that many of our recommendations cannot be accomplished without some type of coordinating entity to implement them. Non-profits or other organizations can and often do provide support to food hubs in regional or local contexts, and they could help facilitate these recommendations. However, a national association would empower the participatory leadership and support the scope to facilitate collective action at a national level of impact. This isn't to say that progress cannot be made unless or until an association is established; in the absence of a national food hub entity, other recommendations can still move forward with other coordinating support. But, in our conversation, an association did emerge as a key organizing base with which to actualize other recommendations and maximize their leverage.

Other priority recommendations and themes seem to fall within three functional categories of work: knowledge dissemination within a food hub community of practice, direct support for food hub operations, and speaking with a collective voice to influence external stakeholders. Some of our recommendations advance more than one category of work. For example, providing education and technical assistance self-evidently contributes to knowledge dissemination, but individual technical assistance and coaching also supports hub leadership by guiding operational decisions. Likewise, food hub networks clearly impact hub

operations through transactional and logistical collaborations, but those collaborations often build innovative tools and educational materials in service of their shared work.

Notably, creating shared metrics would advance recommendations across all categories of work. Shared metrics can be used to directly support hub operations by setting goals and benchmarking outcomes, to disseminate knowledge by better describing case-studies and models, and to influence external stakeholders by clearly delineating impact.